

Budget System User Guide

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PeopleSoft Budgeting Terms

PeopleSoft Terminology	Definition
Role Name	Refers to Budget user role; either Preparer, Reviewer and/or both
Business Unit	Only Business Unit setup is SCU
Planning Model ID	Budget model used to display and prepare budgets by Dept ID.
Planning Center	Planning Center is equal to your SCU Department ID- (CHEM or BIOL for example).
Line Item Budgets	Expense budgets. This includes Discretionary and Non-Discretionary budget. Note: "Line-Item" <i>does not</i> refer to the account value used for budgeting.
Activity	Line Item is the only Activity setup. Note: This <i>does not</i> refer to Activity code in your accounting distribution string.
Chartfield 1	Stands for Activity Code used in accounting distribution. Note: Budget Inquiries will use Chartfield 1 in place of Activity Code
Unlock	Refers to releasing or 'unlocking' the budget for a specific Dept ID. When a budget is 'locked' other users cannot access it and it also dedicates an IT server.
Dimension	Refers to the Chartfields we have setup in the budget system: Fund, Budget Account, Dept ID, Activity and Class

Planning a Budget

Budget Targets: Current Unrestricted (CUF) – 11001

Beginning in March, Current Unrestricted Fund (CUF) Departmental and Student Wages budget targets are established by Budget Office based on the University's Financial Operating Plan approved by the Board of Trustees earlier in the year. The budget targets are assigned to each Provost/VP, who then distributes budget targets to the Deans/Directors or to the department level. Each department is required to establish a CUF Budget Target which is entered into PeopleSoft Budgeting System to reconcile departmental budget inputs by account. Budgets may not be moved between the major budget categories listed below.

Major budget categories input using the PeopleSoft Budgeting System:

1. Departmental
2. Student Wages
3. General University
4. Financial Aid
5. Library Acquisitions
6. Revenue

Other Major budget categories:

7. Staff Salaries
8. Faculty Salaries
9. Benefits

Designated Funds – 21xxx – 28xxx

Designated fund expense targets should be derived from a combination of year-end surplus/ (deficit) and revenue estimates:

1. Forecast year-end surplus or deficit.
2. Add revenue estimate amount to determine an expense target
3. Enter both revenue and expense budgets into PeopleSoft budgeting.

Auxiliary Funds– 3xxxx

Auxiliary funds do not have pre-determined targets, however the Budget Office requires that expenses not exceed revenue and that revenue sharing agreements and reserve transfers be included as part of the budget plan.

1. Estimate revenues for the current fiscal year
2. Estimate operating expenses
3. Estimate revenue sharing agreement (budget to MISC prime account)
4. Estimate transfer to reserve (budget to MISC prime account)
5. Enter both revenue and expense budgets in PeopleSoft

Gift Funds – 46xxx – 48xxx

Expense targets should be derived based on the projected year-end fund balance:

1. Forecast year-end surplus or deficit.
2. Enter both revenue and expense budgets into PeopleSoft budgeting.

Note: Scholarship gift funds that are processed through the Financial Aid office are budgeted by the Budget Office, and are therefore not included as part of the budget planning cycle.

Endowment Income – 41xxx – 45xxx

The expendable amount in endowment income funds is determined by a twelve-quarter rolling market average of interest earned on the principal fund. Salary and benefits increases are estimated for the new-year and subtracted from the overall income amount, the remainder of which is available for budgeting.

1. Forecast Year-end Surplus / (Deficit)
2. Net surplus to zero, carry forward deficit
3. Review Income amount in PS Budgeting (Income has been reduced for any salary and benefits estimates)
4. Subtract estimated deficit from income and use as a base to budget expenses

Note: Endowed scholarship funds that are processed through the Financial Aid office are budgeted by the Budget Office, and are therefore not included as part of the budget planning cycle.

Note: Endowed chair funds are budgeted by the Provost's office and are therefore not included in the budget planning cycle.

Mid-year Budget Adjustments

Current Unrestricted (CUF) – 11001

Budget must remain within CUF. Budget cannot be transferred out of CUF into another fund with the exception of budgeted facility or equipment reserve funds) Budget may be transferred between departments by submitting a Budget Transfer/Setup form to the Budget Office. Be sure the transfer balances the increase and decrease to CUF.

Note: It will be assumed that all budget transfers affect only the current fiscal year unless both the Provost/VP and Budget Office approve a permanent transfer.

Note: Transfers between discretionary prime accounts within a single department will not be processed.

All Other funds – 21xxx – 48xxx

Budget adjustments to designated funds must stay within the available cash plus estimated revenues. Please review the following prior to submitting a budget increase.

1. Start with Beginning Balance (available on a Balance Sheet report).
2. Add year-to-date revenue (available on a Balance Sheet report).
3. Add estimate of additional revenue.
 - a. Submit a budget increase for revenue if necessary
4. Subtract existing expense budget (available on a Budget Summary report).
 - a. The result is the total available for increase.

Note: All budget transfers must stay within the same fund number

Budgeting Student Wages

All Student Employment forms are online at:

<http://www.scu.edu/careercenter/students/studentemployment/forms.cfm>

Requesting New Position Control Numbers:

If a new payroll distribution string is needed and it is not a replacement for an existing string please submit a “Student Employment Authorization” (SEA) form, available at:

<http://www.scu.edu/careercenter/students/studentemployment/forms.cfm>

Changing existing Position Control Numbers:

By changing the payroll distribution string associated with an existing PCN, all students who are assigned to the PCN will be affected, and all future salary expenses will be charged to the new payroll distribution string. To change an existing PCN, please submit a “Student Assignment Change” form, available at:

<http://www.scu.edu/careercenter/students/studentemployment/forms.cfm>

Please refer to the **Department Information** section under the Office of Student Employment website at:

<http://www.scu.edu/careercenter/students/studentemployment/>

Send completed forms via e-mail to the Office of Student Employment at: studentemployment@scu.edu

Budgeting Process Overview

Budget Preparation- Process Summary

Preparer role – budget input and submit for review

Business Planning

- Review Budget Targets for CUF (11001) and Endowments (41xxx) from Dean's Office
- Run reports in PS Financials (Operational Summary, Balance Sheet, etc.)
- Estimate Year-end cash balance in Gift, Designated, and Auxiliary Funds (21xxx, 46xxx, 31xxx)
- Review current year expenses against current year budgets and next year's targets.



System Login then Budgeting Home page My Planning Workspace to select Budget Model Edit Department Budget (Version 1)

- Enter Budget Amounts by
 - Budget (Prime) Account for each Fund
 - Optional: Activity and Class levels
- Add, Modify, Delete rows as needed
- Verify Totals against Target
- **SAVE** your work



Check In (Unlock) Department Budget

- Use Unlock link to return and release lock on Dept budget
- Budgets must be unlocked before they can be submitted



Edit next Department Budget

- Enter Budget Amounts by
 - Budget (Prime) Account for each Fund
 - Optional: Activity and Class levels
- Add, Modify, Delete rows as needed
- Verify Totals against Target
- **SAVE** your work

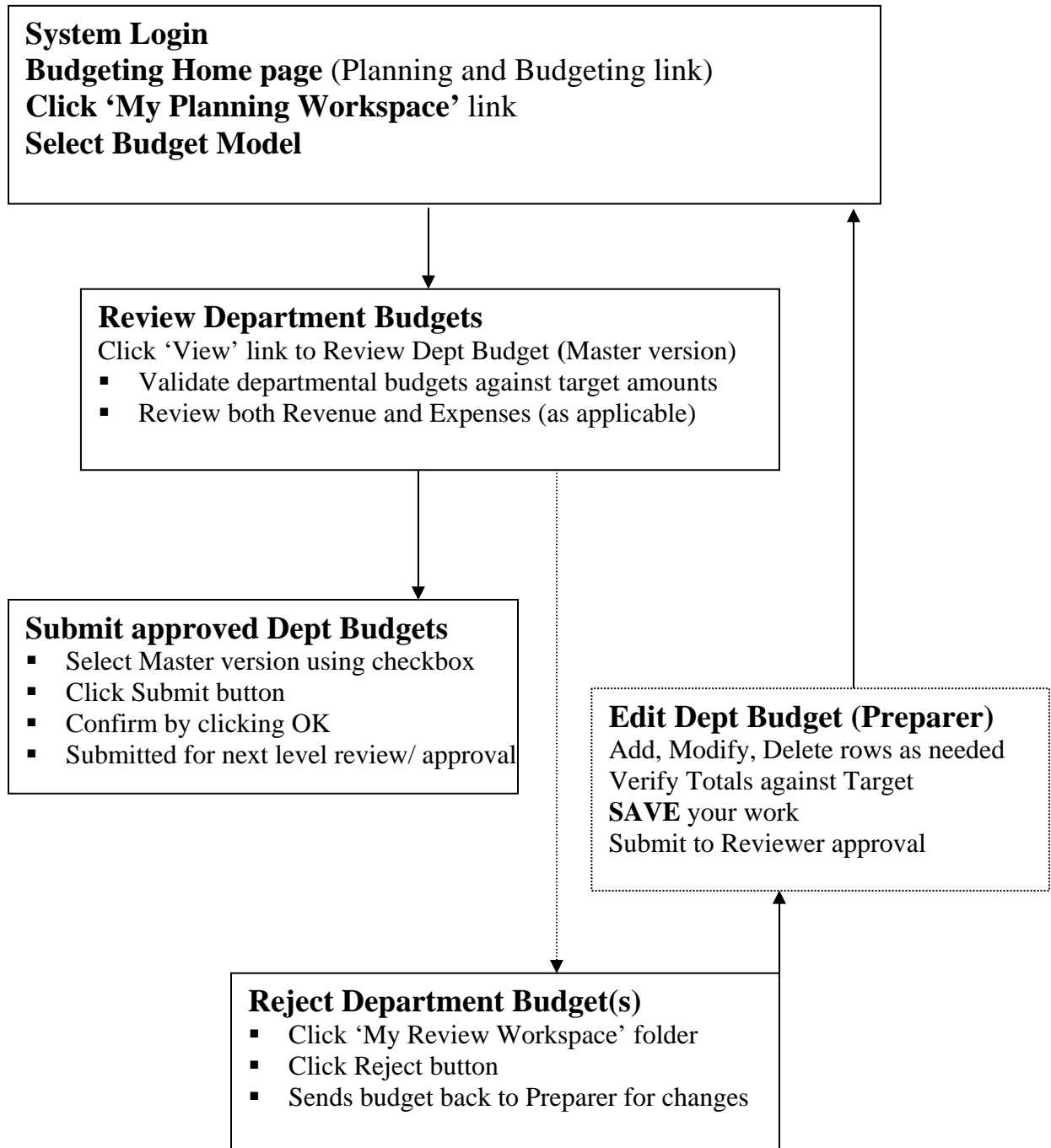


Submit completed Budgets for Review and Approval

- Submit Version 1 of all Dept budgets when finished
- Confirm submission by clicking OK
- Submit all Department budgets so Reviewer can see them and take action to approve or reject

Budget Review and Approval / Rejection - Process Summary

Reviewer role – budget review then approval or rejection



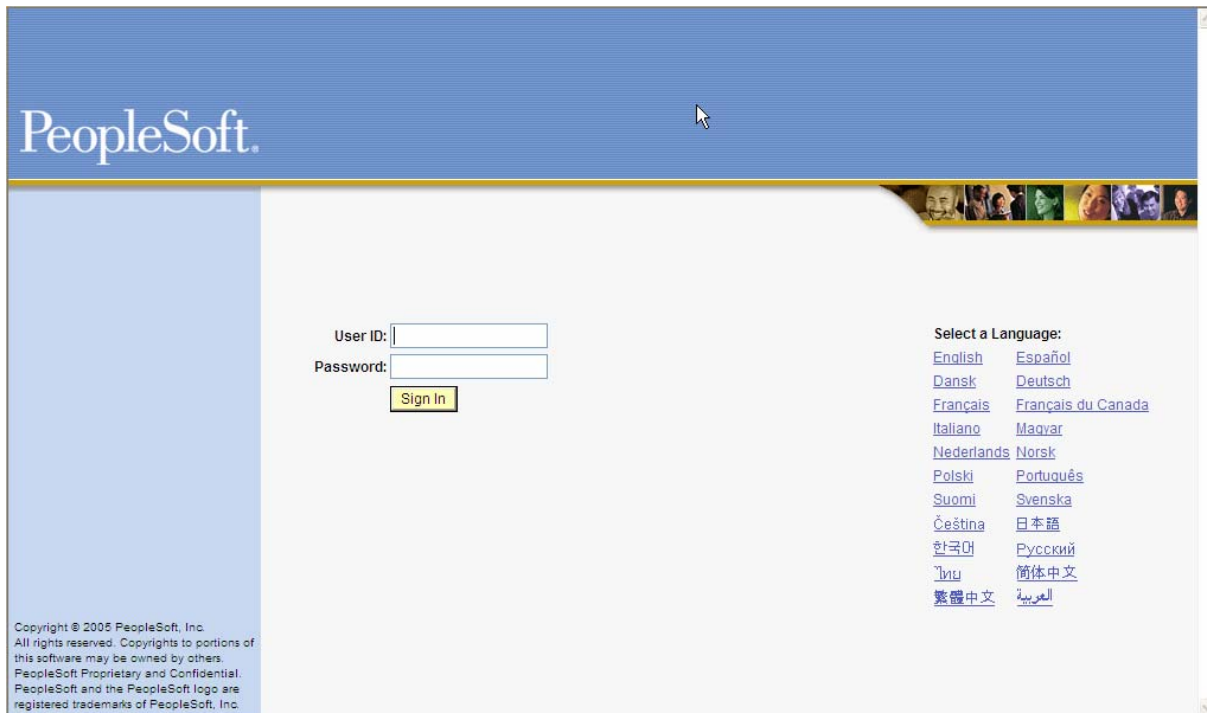
Getting Started with PeopleSoft Budgeting

Web Address: <http://itnt25.scu.edu/psp/pfprd89/?cmd=login>

Enter User ID and Password using ALL CAPS

User ID: *Novell/GroupWise UserID (sometimes truncated to first 8 letters)*

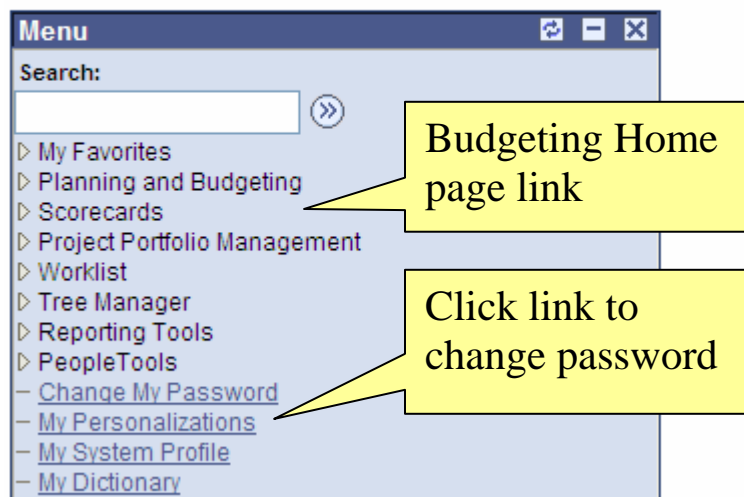
Password: *********



The screenshot shows the PeopleSoft login interface. At the top is the PeopleSoft logo. Below it, there are input fields for 'User ID:' and 'Password:', followed by a 'Sign In' button. To the right, there is a 'Select a Language:' section with a list of language links: English, Español, Dansk, Deutsch, Français, Français du Canada, Italiano, Magyar, Nederlands, Norsk, Polski, Português, Suomi, Svenska, Čeština, 日本語, 한국어, Русский, ไทย, 简体中文, and العربية. At the bottom left, there is a copyright notice: 'Copyright © 2005 PeopleSoft, Inc. All rights reserved. Copyrights to portions of this software may be owned by others. PeopleSoft Proprietary and Confidential. PeopleSoft and the PeopleSoft logo are registered trademarks of PeopleSoft, Inc.'

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Personalize [Content](#) | [Layout](#)



The screenshot shows the PeopleSoft 'Menu' window. It has a search bar and a list of menu items. Two yellow callout boxes are present: one pointing to 'Budgeting Home' with the text 'Budgeting Home page link', and another pointing to 'Change My Password' with the text 'Click link to change password'. The menu items are: My Favorites, Planning and Budgeting, Scorecards, Project Portfolio Management, Worklist, Tree Manager, Reporting Tools, PeopleTools, Change My Password, My Personalizations, My System Profile, and My Dictionary.

Note: After signing-in for the first time, please change your password. Follow the steps below.

- Click Change My Password
- Enter your Current Password, then enter your new password and confirm.
- Click Change Password
- Please make note of your password, the budget office can only reset your password for you.

Budgeting Home - Navigation

To access budget data by Dept ID after Login:

1. Click Planning and Budgeting
2. Click My Planning Workspace link under Activity Preparation
3. Click Search to display models
4. Select model with 2008BDGT 2

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

Menu

Search:

My Favorites

Planning and Budgeting

Planning and Budgeting Setup

Activity Preparation

Analysis and Reporting

My Profile

Scorecards

Project Portfolio Management

Worklist

Tree Manager

Reporting Tools

PeopleTools

Change My Password

My Personalizations

My System Profile

My Dictionary

Main Menu >

Planning and Budgeting

Planning and Budgeting Setup

Define line-item, position, and asset budgeting defaults, planning target defaults, and other parameters to be used in the planning model. Set up and process planning model.

Process Model

Activity Preparation

Perform and review status of budgeting and planning work for line item, position, and asset activities

My Planning Workspace

Documentation and Guidelines

Combination Data Inquiry

Analysis and Reporting

Perform analysis on prepared plans and budgets. View, download, and run reports.

Analysis

Reports

My Profile

Private View Maintenance

Email

Email History

Click 'My Planning Workspace' link to view budget data

Search for Model ID

Click Search to get a list of valid Models

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help | help

Menu

Search:

My Favorites

Planning and Budgeting

Planning and Budgeting Setup

Activity Preparation

My Planning Workspace

Documentation and Guidelines

Analysis and Reporting

My Profile

Reporting Tools

Change My Password

My Personalizations

My System Profile

My Dictionary

My Planning Workspace

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Role Name: begins with

Business Unit: begins with

Planning Model ID: begins with

Activity: begins with

Scenario: begins with

Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

First 1-2 of 2 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
Preparer SCU	FY08_BUDGET_2	LINEITEM	2008BDGT_2	
Preparer SCU	FY08_BUDGET_2	LINEITEM	2008TGT_2	

Click 'Search' to display budget model

Select first model - '2008BDGT 2' scenario

Budget Preparation in PeopleSoft

Display Budget Line Items (Check Out Budget Center)

To open a budget for data entry, click the 'Edit' link for Version 1.

Note: Version 1 is the 'working version' you will enter data into. The "Base" and "Master" versions are read only and cannot be edited.

They provide a permanent baseline budget to return to at any point in the budget planning process.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Menu

Search: []

- My Favorites
- Planning and Budgeting
 - Planning and Budgeting Setup
 - Activity Preparation
 - My Planning Workspace**
 - Documentation and Guidelines
 - Combination Data Inquiry
 - Analysis and Reporting
 - My Profile
 - Scorecards
 - Project Portfolio Management
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

My Planning Workspace

Role Name: Preparer
Business Unit: SCU
Planning Model ID: FY08_BUDGET_2 08 Budget round 2
Activity: Line Item Bdgt
Scenario: 08 Bdgt Round 2 Refresh

Submit Version: All Status: All Refresh

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, select the desired version for each Planning Center and click Submit.

My Planning Workspace

Workspace Details

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy
<input type="checkbox"/>	ATHADM	Athletics Administration	Base	Base Version	Open			View	Copy	
<input type="checkbox"/>	ATHADM	Athletics Administration	Version 1	Version One	Open			Edit	View	Copy
<input type="checkbox"/>	ATHADM	Athletics Administration	Master	Master Version	Open			View	Copy	
<input type="checkbox"/>	ATHFAC	Athletics and Recreation Facil	Base	Base Version	Open			View	Copy	
<input type="checkbox"/>	ATHFAC	Athletics and Recreation Facil	Version 1	Version One	Open			Edit	View	Copy
<input type="checkbox"/>	ATHFAC	Athletics and Recreation Facil	Master	Master Version	Open			View	Copy	

One-time Update (Copy Custom View)

This one-time setup to copy settings for a custom view enables the page to display all columns.

1. Scroll down and click 'Customize' link

[New Window](#) | [Help](#) | [Customize Page](#) | 





Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#)  This version is locked to others while you are editing.

 Line Item Properties

► Dimensions and Members


▼ Action Menu

















Action:   Analysis:   [Hot Keys Help](#)

User View

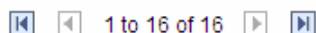
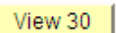
☐ Private ☒ Public View:   [View](#) [Create](#)

  1 to 16 of 16  

Amount Summary [Periods](#) [History](#) 

Account	Fund Code	Department	Class Field	Chartfield 1	Hot Keys	Amount	Hold
<input checked="" type="checkbox"/> ASSET	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> ASSET	46309	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> BENEXP	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> FACSAL	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> GIFTS	46309	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> INSTRU	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> MAIL	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> MISC	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> MISC	46309	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> PHONE	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> REPROD	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> REVOTH	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> SUPPLY	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> SUPPLY	46309	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> SWAGE	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 
<input checked="" type="checkbox"/> TRAVEL	11001	AMTH			<input type="text"/>	0.00	<input type="checkbox"/> 

[Customize](#) | [Find](#) | [Download](#)

 1 to 16 of 16 

► Totals



Go to Planning Workspace: [Don't Unlock](#) [Unlock](#)  This version is locked to others while you are editing.

2. Click the 'Copy Settings' link

The screenshot shows the PeopleSoft interface with the 'Personalize Column and Sort Order' dialog box open. The dialog box has a title bar and a main content area. On the left, there is a 'Menu' sidebar with a search bar and a list of navigation options. The main content area is titled 'Personalize Column and Sort Order' and contains two panes: 'Column Order' and 'Sort Order'. The 'Column Order' pane lists various fields with checkboxes for 'Hidden' and 'Frozen'. The 'Sort Order' pane is empty. Below the panes, there are buttons for 'OK', 'Cancel', 'Preview', and 'Copy Settings'. The 'Copy Settings' link is circled in red.

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Home | Worklist | Add to Favorites | Sign out

New Window | Help | http

Menu

Search: []

- My Favorites
- Planning and Budgeting
 - Planning and Budgeting Setup
- Activity Preparation
 - My Planning Workspace
 - Documentation and Guidelines
 - Combination Data Inquiry
 - Analysis and Reporting
 - My Profile
 - Scorecards
 - Project Portfolio Management
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Amount Summary (frozen)
- (column 2) (frozen)
- Account (frozen)
- Fund Code (frozen)
- Department (frozen)
- Class Field (frozen)
- Chartfield 1 (frozen)
- Hot Keys
- Amount
- Hold
- (column 73)
- Tab Periods
- Budget Period 2008
- Tab History
- Prior Year Actuals
- Year To Date Actuals
- Current Year Budget

☐ Hidden
☐ Frozen

Sort Order

☐ Descending

OK Cancel Preview [Copy Settings](#)

3. Click the 'magnifying glass' icon to display setting.

The screenshot shows the PeopleSoft interface with the 'Copy Settings' dialog box open. The dialog box has a title bar and a main content area. On the left, there is a 'Menu' sidebar with a search bar and a list of navigation options. The main content area is titled 'Copy Settings' and contains a section 'Copy Your Customization Settings' with a search bar and a magnifying glass icon. The magnifying glass icon is circled in red. Below the search bar, there are buttons for 'OK' and 'Cancel'.

PeopleSoft®

Home

Menu

Search: []

- My Favorites
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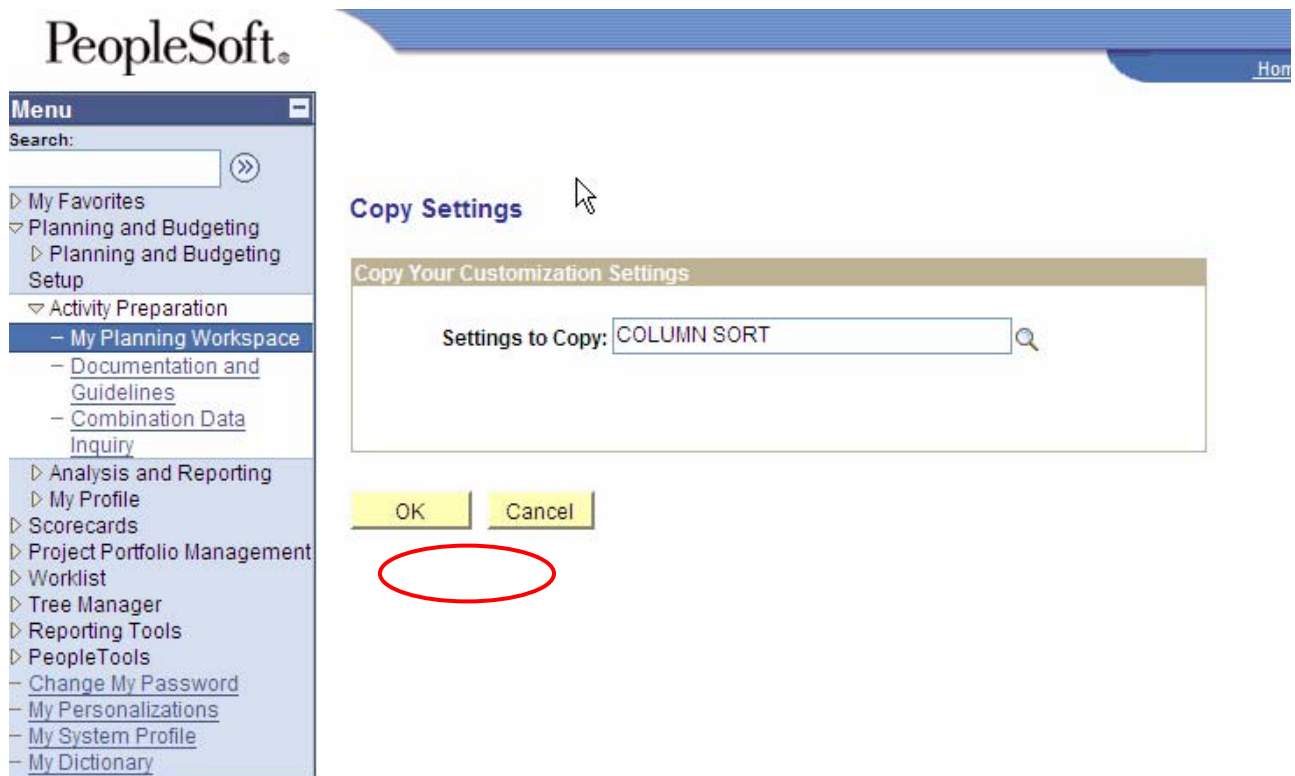
Copy Settings

Copy Your Customization Settings

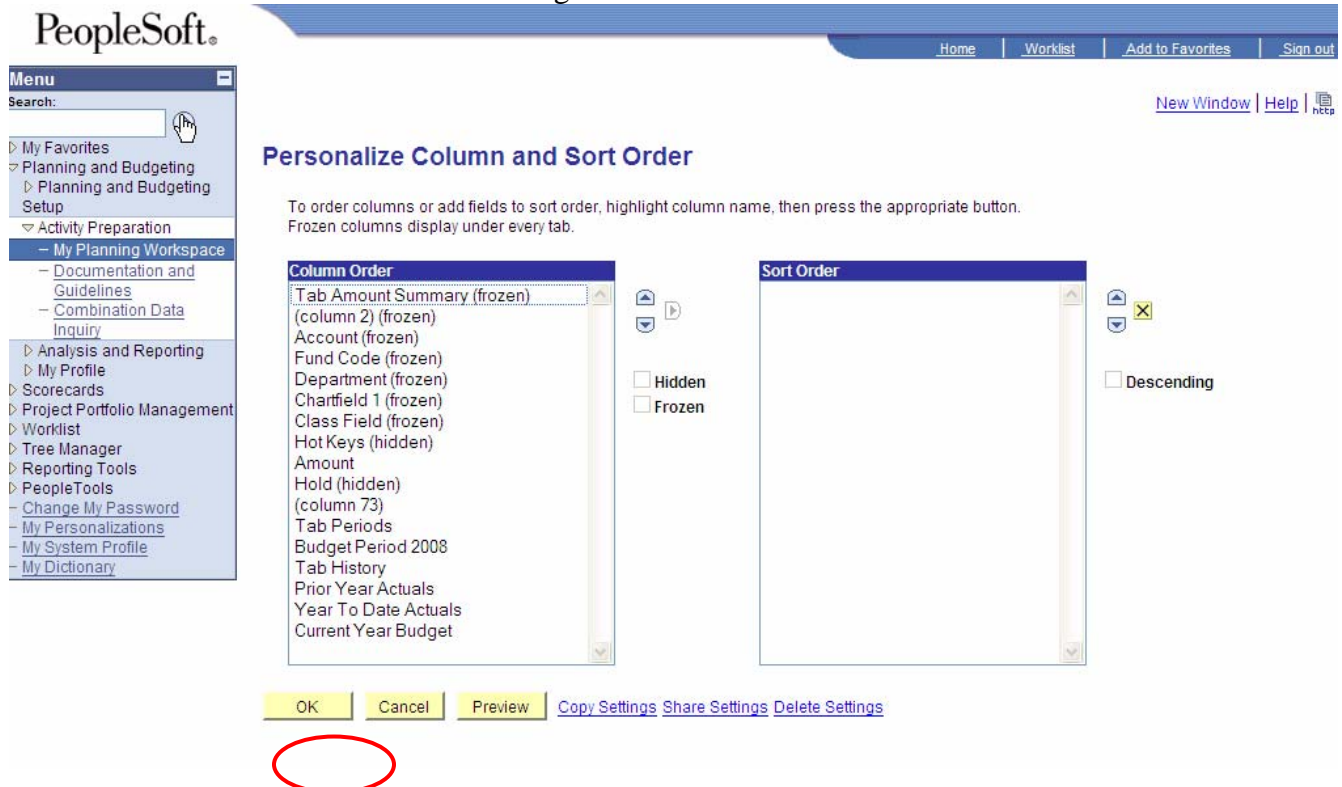
Settings to Copy: []

OK Cancel

4. Select 'COLUMN SORT' then click the OK button



5. Click the 'OK' button to save changes



Line Item Details

Main page to view and edit budget data for selected Department

Each Budget account combination (Account, Fund, Activity and Class) for the Department are displayed

The screenshot shows the PeopleSoft interface for the 'Line Item Details' page. A yellow callout box points to the 'Expand icon' (a small icon with four arrows pointing outwards) located in the 'History' tab of the table header, with the text 'Click 'Expand icon' to view all columns'. Another yellow callout box points to the right side of the table, with the text 'Scroll right to view data'. A red arrow at the bottom of the page points to the right.

Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

Line Item Properties

Dimensions and Members

Action Menu

Action: Analysis: [Hot Keys Help](#)

User View

☐ Private ☒ Public View:

Account	Fund Code	Department	Chartfield 1	Class Field	Amount
<input checked="" type="checkbox"/> ASSET	11001	AMTH			0.00
<input checked="" type="checkbox"/> ASSET	46309	AMTH			0.00
<input checked="" type="checkbox"/> BENEXP	11001	AMTH			0.00
<input checked="" type="checkbox"/> FACSAL	11001	AMTH			0.00
<input checked="" type="checkbox"/> GIFTS	46309	AMTH			0.00
<input checked="" type="checkbox"/> INSTRU	11001	AMTH			0.00
<input checked="" type="checkbox"/> MAIL	11001	AMTH			0.00
<input checked="" type="checkbox"/> MISC	11001	AMTH			0.00
<input checked="" type="checkbox"/> MISC	46309	AMTH			0.00
<input checked="" type="checkbox"/> PHONE	11001	AMTH			0.00
<input checked="" type="checkbox"/> REPROD	11001	AMTH			0.00

Changing Budget Views

Click the arrow next to **Dimensions and Members** toolbar to expand and filter views

PeopleSoft®

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Menu

Search: >>

- My Favorites
- Planning and Budgeting
 - Planning and Budgeting Setup
 - Activity Preparation
 - My Planning Workspace
 - Documentation and Guidelines
 - Combination Data Inquiry
 - Analysis and Reporting
 - My Profile
- Scorecards
- Project Portfolio Management
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

Item Properties

Dimensions and Members

Action Menu

Action: Add Entry Go Analysis: Go Hot Keys Help

User View

☐ Private ☒ Public View: Preparer view Refresh View Create

Save 1 to 16 of 16 View 30 Hold All

Account	Fund Code	Department	Chartfield 1	Class Field	Amount	Budget Period 2008	Pri
✓ ASSET	11001	AMTH			0.00	0.00	
✓ ASSET	46309	AMTH			0.00	0.00	
✓ BENEXP	11001	AMTH			0.00	0.00	
✓ FACSAL	11001	AMTH			0.00	0.00	
✓ GIFTS	46309	AMTH			0.00	0.00	
✓ INSTRU	11001	AMTH			0.00	0.00	
✓ MAIL	11001	AMTH			0.00	0.00	
✓ MISC	11001	AMTH			0.00	0.00	
✓ MISC	46309	AMTH			0.00	0.00	
✓ PHONE	11001	AMTH			0.00	0.00	

Display Fund Descriptions

To display Fund Code descriptions select the Show Description checkbox.
The fund description is helpful when your Department has multiple funds.

The screenshot shows the PeopleSoft interface for 'Line Item Details'. On the left is a 'Menu' sidebar with options like 'My Favorites', 'Planning and Budgeting', 'Activity Preparation', 'My Planning Workspace', 'Analysis and Reporting', 'My Profile', 'Scorecards', 'Project Portfolio Management', 'Worklist', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Line Item Details' and includes a 'Go to Planning Workspace' section with 'Don't Unlock' and 'Unlock' links. Below this is the 'Line Item Properties' section, which contains a 'Dimensions and Members' table. The table has columns for 'Dimensions', 'Dimension Level', 'Show Code', and 'Show Description'. The 'Fund Code' row has a checked 'Show Description' checkbox, which is circled in red. A yellow callout box with the text 'Check to display fund description' points to this checkbox. Below the table is a 'Refresh Dimensions' button. At the bottom is an 'Action Menu' with 'Add Entry' and 'Go' buttons, and a 'User View' section with 'Private' and 'Public' radio buttons, a 'View' dropdown set to 'Preparer view', and 'Refresh', 'View', and 'Create' buttons. The bottom status bar shows 'Save', '1 to 30 of 180', 'View 100', and 'Hold All'.

Dimensions	Dimension Level	Show Code	Show Description
Account		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chartfield 1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Class Field		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Currency Code		<input type="checkbox"/>	<input type="checkbox"/>
Department		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fund Code		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Filter Fund Codes

Select the 'Filter Dimension Members' folder at top

Enter range of fund codes to limit view, 11001 to 11001 for example to filter CUF only.

Click the Refresh Dimension button to update

PeopleSoft. Home Worklist Add to Favorites Sign out

Menu Search: >>

- My Favorites
- Planning and Budgeting
 - Planning and Budgeting Setup
- Activity Preparation
 - My Planning Workspace
 - Documentation and Guidelines
 - Combination Data Inquiry
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- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
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Line Item Properties

Dimensions and Members

Dimensions Filter Dimension Members

Account From To Account Category

Chartfield 1

Class Field

Currency Code

Department ATHADM ATHADM

Fund Code 11001 11001

Refresh Dimensions

Action: Add Entry Go Analysis: Go Hot Keys Help

User View Private Public View: Preparer view Refresh View Create

Save 1 to 30 of 180 View 100 Hold All

Example showing changes: added Fund Description and filtered to only display fund 11001

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Refresh Dimensions

Action Menu

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Account	Fund Code	Department	Chartfield 1	Class Field	Amount
ASSET	11001	Current Unrestricted Fund AMTH			0.00
BENEXP	11001	Current Unrestricted Fund AMTH			0.00
FACSAL	11001	Current Unrestricted Fund AMTH			0.00
INSTRU	11001	Current Unrestricted Fund AMTH			0.00
MAIL	11001	Current Unrestricted Fund AMTH			0.00
MISC	11001	Current Unrestricted Fund AMTH			0.00
PHONE	11001	Current Unrestricted Fund AMTH			0.00
REPROD	11001	Current Unrestricted Fund AMTH			0.00
REVOTH	11001	Current Unrestricted Fund AMTH			0.00
SUPPLY	11001	Current Unrestricted Fund AMTH			0.00
SWAGE	11001	Current Unrestricted Fund AMTH			0.00
TRAVEL	11001	Current Unrestricted Fund AMTH			0.00

Customize Find Download

View Additional or All rows

To view the next set of 30 rows, use the left and right arrow buttons

To view the first/last set of 30 rows, use the “First” or “Last” link

To view all rows, click “View All”

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Line Item Details

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Line Item Properties

Dimensions and Members

Action Menu

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User View

☐ Private ☒ Public View: [View](#) [Create](#)

1 to 30 of 63 [View All](#)

Amount Summary **Periods** **History**

Account	Fund Code	Department	Chartfield 1	Class Field	Amount
✓ ASSET	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	FNDERS		0.00
✓ CONTRS	11001	ATHADM	ATHOP		0.00
✓ CONTRS	11001	ATHADM	NCAA	10	0.00
✓ CONTRS	11001	ATHADM	NCAA	11	0.00
✓ CONTRS	11001	ATHADM	SCHED		0.00
✓ EXPINT	11001	ATHADM			0.00
✓ EXPINT	11001	ATHADM	ATHOP		0.00
✓ FINADE	11001	ATHADM			0.00

Sort by Columns

To sort data by a particular column; click on the desired column heading. Click once for ascending, click again for descending order.

Example shows resort by Activity Code (Chartfield 1).

Line Item Details

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▶ Line Item Properties

▶ Dimensions and Members

▼ Action Menu

Action: Add Entry Go Analysis: Go [Hot Keys Help](#)

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Save 1 to 30 of 63 View All Hold All

Account	Fund Code	Department	Chartfield 1	Class Field	Amount	Budget Period 2008	Prior Year Actuals	Year To Date Ac
✓ CONTRS	11001	ATHADM	SCHED		0.00	0.00	0.00	7.00
✓ MAIL	11001	ATHADM	NCAA	15	0.00	0.00	38.16	
✓ CONTRS	11001	ATHADM	NCAA	11	0.00	0.00	6,541.08	6,600.00
✓ MAIL	11001	ATHADM	NCAA	11	0.00	0.00	20.34	
✓ MISC	11001	ATHADM	NCAA	11	0.00	0.00	95.00	
✓ MAIL	11001	ATHADM	NCAA	10	0.00	0.00	6.78	
✓ CONTRS	11001	ATHADM	NCAA	10	0.00	0.00	1,753.47	2,100.00
✓ MISC	11001	ATHADM	NCAA	10	0.00	0.00	0.00	4.00
✓ BENEXP	11001	ATHADM	FNDRS		0.00	0.00	50,099.10	21,100.00

View Budget Totals

During budget preparation, totals can be verified at any time.

Totals are displayed at the bottom of the Line Items Details Page.

To update budget totals; click the yellow Save button in the lower left corner.

1 to 30 of 63 View All

▶ Totals

Save

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#)

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Budget Preparation (Line Item Details)

Entering Budget Amounts

To enter budget amounts for the new fiscal year; input data (positive for both revenue and expense) for each distribution under the 'Budget Period 2008' column.
Click the SAVE button to update and display the amount.

Line Item Details

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▶ Line Item Properties

▶ Dimensions and Members

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Action:

Analysis:

[Hot Keys Help](#)

User View

☐ Private

☒ Public

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[View](#)

[Create](#)

Save

1 to 16 of 16

Enter budget data here

Account	Fund Code	Department	Chartfield 1	Class Field	Amount	Budget Period 2008	Prior Year Actuals	Year To Date
<input checked="" type="checkbox"/> CONTRS	11001	ACADAF			0.00	0.00	20,000.00	
<input checked="" type="checkbox"/> CONTRS	11001	ACADAF	GENL		0.00	0.00	5,363.92	
<input checked="" type="checkbox"/> CONTRS	11001	ACADAF	PROG		0.00	0.00	3,000.00	
<input checked="" type="checkbox"/> EXPINT	11001	ACADAF			0.00	0.00	6,982.50	
<input checked="" type="checkbox"/> EXPINT	11001	ACADAF	GENL		0.00	0.00	19,250.00	
<input checked="" type="checkbox"/> FACSAL	11001	ACADAF	GENL		0.00	0.00	161.50	
<input checked="" type="checkbox"/> MISC	11001	ACADAF			0.00	0.00	0.00	
<input checked="" type="checkbox"/> MISC	11001	ACADAF	GENL		0.00	0.00	10,573.68	

Adding New Budget Lines

If you need to add budget for a line item that is not displayed you can add a line item.

To add a line: under **Action Menu** select **Add Entry** from the drop-down then click **GO** button.

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Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#)

Line Item Properties

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Account	Fund Code	Department	Chartfield 1	Class Field	Amount
✓ ASSET	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	ATHOP		0.00
✓ BENEXP	11001	ATHADM	FNDERS		0.00
✓ CONTRS	11001	ATHADM	ATHOP		0.00
✓ CONTRS	11001	ATHADM	NCAA	10	0.00
✓ CONTRS	11001	ATHADM	NCAA	11	0.00
✓ CONTRS	11001	ATHADM	SCHED		0.00
✓ EXPINT	11001	ATHADM	ATHOP		0.00
✓ EXPINT	11001	ATHADM	ATHOP		0.00
✓ FINADE	11001	ATHADM			0.00

To add budget line:
Select Add Entry and click Go.

Enter the desired accounting distribution string and click **Add** button
To enter multiple rows click the + button, enter number of rows to add

Line Item Details

Add Line Item

Business Unit: SCU General Ledger BU

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

Activity: LINEITEM Line Item Budgeting

Scenario: 2008BDGT_2 2008 Proposed Budget

Planning Center: ATHADM Athletics Administration

Version: 1 Version 1

Account	Fund Code	Department	Class Field	Chartfield 1
ASSET	11001	ATHADM		

Add **Cancel**

To add multiple lines:
Click + and enter # of lines

Save your work using SAVE button at top or bottom.
PeopleSoft will not allow you to enter duplicate distribution strings.

Removing Budget Lines

Once added, budget lines cannot be removed from your view. Set the amount to zero to “eliminate” the effect on your budget.

Zero budget lines will not be imported as part of your new fiscal year budget.

Completing Budget Preparation (Check-In Budget)

Saving Budget Input and Changes

Important: make sure you click the **Save** button at the bottom left to save all input and changes

- Enter all budget amounts (both Revenue and Expense) as positive numbers.
- Revenue – Expenses do not exceed Target or beginning fund balance.
- To change entered amounts just re-enter correct, adjusted amount.
 - Example: entered \$1,000 but need to decrease to \$500, just replace with \$500 and click Save
 - Example: entered \$1,000 but need to increase to \$1,500, just replace with \$1,500 click Save.

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Line Item Details

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Line Item Properties

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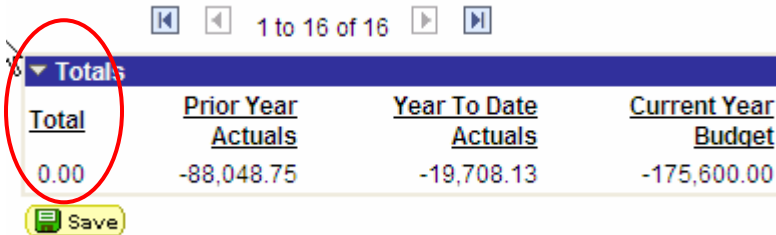
Save 1 to 30 of 63 View All Hold All

Account	Fund Code	Department	Chartfield 1	Class Field	Amount	Budget Period 2008	Pri
ASSET	11001	ATHADM	ATHOP		0.00	0.00	
BENEXP		ATHADM			0.00	0.00	
BENEXP			OP		0.00	0.00	
BENEXP			RS		0.00	0.00	
CONTRS			OP		0.00	0.00	
CONTRS	11001	ATHADM	NCAA	10	0.00	0.00	
CONTRS	11001	ATHADM	NCAA	11	0.00	0.00	
CONTRS	11001	ATHADM	SCHED		0.00	0.00	
EXPINT	11001	ATHADM			0.00	0.00	
EXPINT	11001	ATHADM	ATHOP		0.00	0.00	

Click Save to save all changes

Review Totals against Targets before Submitting Budgets

Use the Totals section at the bottom to review budget entry amounts to Target amounts. Total column on left shows current year budget total entered (Revenue – Expense)



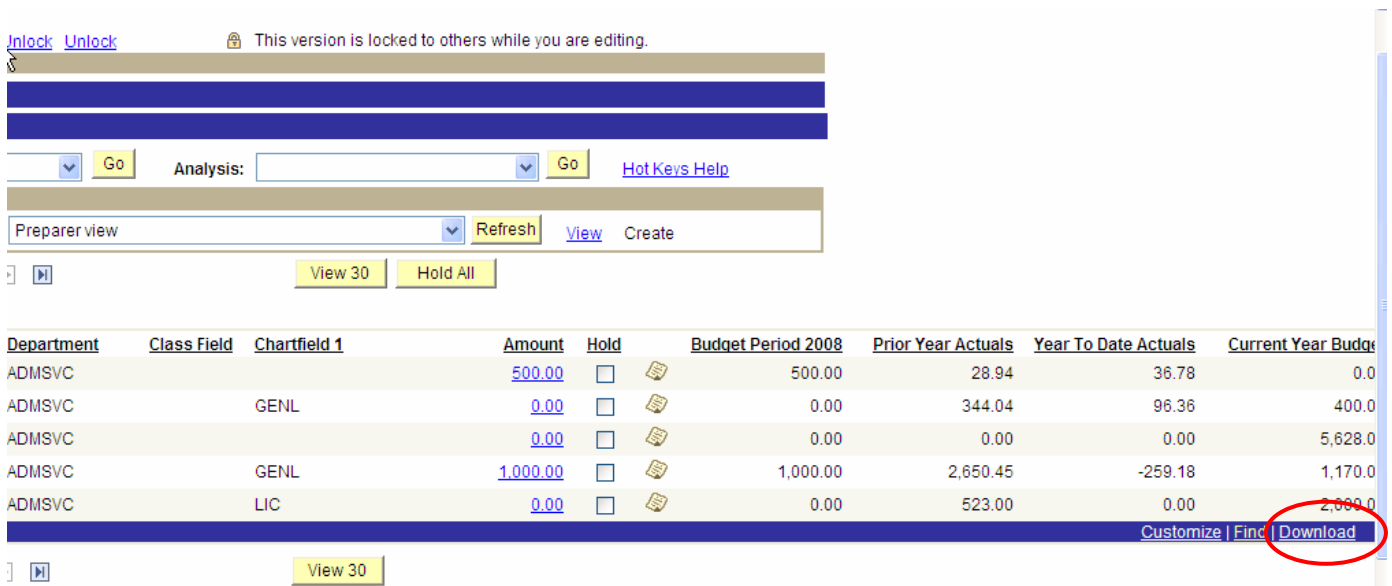
Totals			
Total	Prior Year Actuals	Year To Date Actuals	Current Year Budget
0.00	-88,048.75	-19,708.13	-175,600.00

Save

Downloading Budget data to Excel

The 'Download' link on bottom right allows you to download budget data shown on the screen to Excel. Make sure you display 'View All' to display all rows or Sort or Filter as needed to display data on screen.

Enable your browser to allow 'Pop Up' window or hold the CTRL key (for Internet Explorer) to let it open a window with the new file.



[Unlock](#) [Unlock](#) This version is locked to others while you are editing.

[Go](#) Analysis: [Go](#) [Hot Keys Help](#)

Preparer view [Refresh](#) [View](#) [Create](#)

[View 30](#) [Hold All](#)

Department	Class Field	Chartfield 1	Amount	Hold	Budget Period 2008	Prior Year Actuals	Year To Date Actuals	Current Year Budget
ADMSVC			500.00	<input type="checkbox"/>	500.00	28.94	36.78	0.0
ADMSVC		GENL	0.00	<input type="checkbox"/>	0.00	344.04	96.36	400.0
ADMSVC			0.00	<input type="checkbox"/>	0.00	0.00	0.00	5,628.0
ADMSVC		GENL	1,000.00	<input type="checkbox"/>	1,000.00	2,650.45	-259.18	1,170.0
ADMSVC		LIC	0.00	<input type="checkbox"/>	0.00	523.00	0.00	2,000.0

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[View 30](#)

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http://itnt18.scu.edu:8070/psc/pfupg89/?cmd=viewattach&userfile=ps.xls&dirname=V19431 - Microsoft Int...

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Back Forward Stop Home Search Favorites

Address http://itnt18.scu.edu:8070/pfupg89/psft/V-960480092/ps.xls

Go Links

File Download

Do you want to open or save this file?

Name: ps.xls
Type: Microsoft Excel Worksheet, 1.84 KB
From: itnt18.scu.edu

Open Save Cancel

☒ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

Downloaded from site: http://itnt18.scu.edu:8070/pfupg89/psft/V-960480092/ps.xls

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Totals

	A	B	C	D	E	F	G	H	I	J	K	L
1	Account	Fund Code	Department	Class Field	Chartfield 1	Amount	Hold		Budget Period 2008	Prior Year Actuals	Year To Date Actuals	Current Ye
2	MAIL	11001	ADMSVC			500.00	N	Notes	500	28.94		36.78
3	MAIL	11001	ADMSVC		GENL	0.00	N	Notes	0	344.04		96.36
4	MISC	11001	ADMSVC			0.00	N	Notes	0	0		0
5	MISC	11001	ADMSVC		GENL	1,000.00	N	Notes	1,000.00	2,650.45		-259.18
6	MISC	11001	ADMSVC		LIC	0.00	N	Notes	0	523		0
7												
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ps/

Unlocking Budgets (Return to My Planning Workspace)

Make sure you use the UNLOCK link to return to My Planning Workspace.

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> Dimensions and Members

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Action: Add Entry Go Analysis: Go Hot Keys Help

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Account	Fund Code	Department	Chartfield 1	Class Field	Amount	Budget Period 2008	Pri
✓ ASSET	11001	ATHADM	ATHOP		0.00	0.00	
✓ BENEXP	11001	ATHADM			0.00	0.00	
✓ BENEXP	11001	ATHADM	ATHOP		0.00	0.00	
✓ BENEXP	11001	ATHADM	FNDRS		0.00	0.00	
✓ CONTRS	11001	ATHADM	ATHOP		0.00	0.00	
✓ CONTRS	11001	ATHADM	NCAA	10	0.00	0.00	
✓ CONTRS	11001	ATHADM	NCAA	11	0.00	0.00	
✓ CONTRS	11001	ATHADM	SCHED		0.00	0.00	
✓ EXPINT	11001	ATHADM			0.00	0.00	
✓ EXPINT	11001	ATHADM	ATHOP		0.00	0.00	

Submitting Completed Budgets

Budgets must be unlocked before they can be submitted. Click the Unlock button (if shown)

To submit a completed budget for Review and Approval

- Check the box in Select column next to Version 1 of budget
- Click Submit button
- Confirm submission by clicking OK

My Planning Workspace

Role Name: Preparer

Business Unit: SCU

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

Activity: Line Item Bdgt

Scenario: 08 Bdgt Round 2

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[Refresh](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

[Submit](#) Version: All Status: All [Refresh](#)

My Planning Workspace

Customize | Find | View 10 | First 16-115 of 612 Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Base	Base Version	Open			View	Copy	
<input checked="" type="checkbox"/>	ADMSVC	Administrative Service	Version 1	Version One	Open			Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Master	Master Version	Open			View	Copy	
<input type="checkbox"/>	ADOBE	Adobe Edge	Base	Base Version	Open			View	Copy	
<input type="checkbox"/>	ADOBE	Adobe		Version One	Open			Edit	View	Copy
<input type="checkbox"/>	ADOBE	Adobe		Master Version	Open			View	Copy	
<input type="checkbox"/>	ADVLRC	Advising Resource C	Base	Base Version	Open			View	Copy	
<input type="checkbox"/>	ADVLRC	Advising & Learning	Version 1	Version One	Open			Edit	View	Copy

Click checkbox and click Submit button

Last saved 5/18/2007 - 8:23 AM

Budgeting User Manual

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Submitting Completed Budgets – continued

Once budget is submitted it can be Approved (or Rejected) by the Reviewer

Submit Confirmation

Are you sure that you want to Submit the following Planning Center(s)?

Planning Centers		
Planning Center	Description	Version
ADMSVC	Administrative Service	Version 1

Click OK to submit, Cancel to return without submitting.

OK

Cancel

My Planning Workspace

Role Name: Preparer

[Workspace Search](#)

Business Unit: SCU

[User Preferences](#)

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

[Email](#)

Activity: Line Item Bdgt

Scenario: 08 Bdgt Round 2

Refresh

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit

Version: All

Status: All

Refresh

My Planning Workspace

[Customize](#) | [Find](#) | [View 10](#) | [First](#) | 16-115 of 612 | [Last](#)

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Base	Base Version					View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Version 1	Version One	Submitted			Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Master	Master Version	Submitted				View	Copy
<input type="checkbox"/>	ADOBE	Adobe Lodge	Base	Base Version	Open				View	Copy
<input type="checkbox"/>	ADOBE	Adobe Lodge	Version 1	Version One	Open			Edit	View	Copy
<input type="checkbox"/>	ADOBE	Adobe Lodge	Master	Master Version	Open				View	Copy

Budget Review and Approval (Reviewer Role)

Reviewing and Approving or Rejecting Budgets

Important: all Department level budgets must be Submitted before a Reviewer can see and Approve or Reject the budget

Example where all Department budgets are not submitted

- Shows 'Not Ready' status for Reviewer, solution is for Preparer to submit all Dept budgets



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My Planning Workspace

Role Name: Reviewer

[Workspace Search](#)

Business Unit: SCU

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Planning Model ID: FY08_BUDGET_2 08 Budget round 2

[Email](#)

Activity:

Scenario:

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

My Preparation Workspace | [My Review Workspace](#) Version: Status:

My Planning Workspace									
Customize Find View All First 1-2 of 2 Last									
Workspace <input type="button" value="Details"/>									
Select	Planning Center	Description	Version	Description	Status	Locked	Date	Locked By	View Copy
<input type="checkbox"/>	B_ADMINSVC		Base	Base Version	▼ Not Ready				View Copy
<input type="checkbox"/>	B_ADMINSVC		Master	Master Version	▼ Not Ready				View Copy

My Preparation Workspace | [My Review Workspace](#)

Budget Review before Approval / Rejection

Click the **My Review Workspace** link to display individual Departments under the Rollup/ Node level.
Then click the View link to see Department level budget data



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My Planning Workspace

Role Name: Reviewer

Business Unit: SCU

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

Activity:

Scenario:

[Workspace Search](#)

Click 'My Review Workspace' to see Dept level budgets.

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

[My Preparation Workspace](#)

[My Review Workspace](#)

Version:

Status:

My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) | First Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	View	Copy
<input type="checkbox"/>	B_ADMINSVC		Base	Base Version	Open			View	Copy
<input type="checkbox"/>	B_ADMINSVC		Master	Master Version	Open			View	Copy

[My Preparation Workspace](#) | [My Review Workspace](#)

My Planning Workspace

Role Name: Reviewer

Business Unit: SCU

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

Activity: Line Item Bdgt

Scenario: 08 Bdgt Round 2 Refresh





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To view a budget or plan for a Planning Center, select the desired version and click View. To reject a budget or plan that has been submitted, click Reject.

[My Preparation Workspace](#) | [My Review Workspace](#)

My Review Workspace				Customize	Find		First 	1-2 of 2 	Last
- Planning Center	Description	Status	*Version	View	Reject	Details			
 B_ADMIN SVC		Open	Master	View	Reject	Details			
..ADMSVC	Administrative Service	Submitted	Master	View	Reject	Details			

[My Preparation Workspace](#) | [My Review Workspace](#)

Budget Review before Approval / Rejection

Review line items and amounts, you can sort by column and download data to Excel the same as Preparers can.

To return for Approval / Rejection click the My Workspace link

Line Item Details

Go to Planning Workspace:

[My Workspace](#)

After review click 'My Workspace' to return for Approval / Rejection

► Line Item Properties

► Dimensions and Members

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Hold All

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Periods

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Account	Fund Code	Department	Class Field	Chartfield 1	Amount	Hold	
MAIL	11001	ADMSVC			500.00	<input type="checkbox"/>	
MAIL	11001	ADMSVC		GENL	0.00	<input type="checkbox"/>	
MISC	11001	ADMSVC			0.00	<input type="checkbox"/>	
MISC	11001	ADMSVC		GENL	1,000.00	<input type="checkbox"/>	
MISC	11001	ADMSVC		LIC	0.00	<input type="checkbox"/>	
PHONE	11001	ADMSVC		GENL	3,000.00	<input type="checkbox"/>	
PHONE	11001	ADMSVC		UNIVG	0.00	<input type="checkbox"/>	
R&B	11001	ADMSVC		LIC	0.00	<input type="checkbox"/>	
R&M	11001	ADMSVC			0.00	<input type="checkbox"/>	

Submitting Approved Budget – Reviewer Level

To submit your budgets after review;

- At the My Planning Workspace page select the checkbox for the Master Version
- Click the Submit button
- Click OK to confirm

My Planning Workspace

Role Name: Reviewer

[Workspace Search](#)

Business Unit: SCU

[User Preferences](#)

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

[Email](#)

Activity: Line Item Bdgt

Scenario: 08 Bdgt Round 2

Refresh

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit

My Preparation Workspace | [My Review Workspace](#)

Version: All

Status: All

Refresh

My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) | First 1 of 2 Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	View	Copy
<input type="checkbox"/>	B_ADMINSVC		Base	Base Version	Open			View	Copy
<input checked="" type="checkbox"/>	B_ADMINSVC		Master	Master Version	Open			View	Copy

Submit

My Preparation Workspace | [My Review Workspace](#)

Click checkbox and
click Submit button

Submit Confirmation

Are you sure that you want to Submit the following Planning Center(s)?

Planning Centers

Planning Center	Description	Version
B_ADMINSVC		Master

Click OK to submit, Cancel to return without submitting.

OK

Cancel

Approving Budget after Review

Status changed to Submitted

[User Guide](#)

My Planning Workspace

Role Name: Reviewer

[Workspace Search](#)

Business Unit: SCU

[User Preferences](#)

Planning Model ID: FY08_BUDGET_2 08 Budget round 2

[Email](#) 

Activity: Line Item Bdgt

Scenario: 08 Bdgt Round 2

Refresh

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit

My Preparation Workspace | [My Review Workspace](#)

Version: All

Status: All

Refresh

My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) |  First 1-2 of 2 Last

Workspace Details 

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	View	Copy
<input type="checkbox"/>	B_ADMINSVC		Base	Base Version				View	Copy
<input type="checkbox"/>	B_ADMINSVC		Master	Master Version	Submitted			View	Copy

Submit

My Preparation Workspace | [My Review Workspace](#)

Resubmitting Rejected Budgets

If your budget has been rejected by the Reviewer then it will show Rejected status
Click Edit link (Version 1) to open budget and correct/ adjust as needed
Resubmit budget when finished using checkbox and Submit button

My Planning Workspace

Role Name: Preparer
Business Unit: SCU
Planning Model ID: FY08_BUDGET_2 08 Budget round 2
Activity: Line Item Bdgt
Scenario: 08 Bdgt Round 2

[Workspace Search](#)


[User Preferences](#)

[Email](#) 

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Version: All Status: All

My Planning Workspace [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

[Workspace](#) [Details](#) 

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Base	Base Version				View	Copy	
<input type="checkbox"/>	ADMSVC	Administrative Service	Version 1	Version One	■ Rejected			Edit	View	Copy
<input type="checkbox"/>	ADMSVC	Administrative Service	Master	Master Version	■ Rejected			View	Copy	

Click Edit link to open budget, make change changes/ corrections

Budget Analysis Reports

Query and nVision

Coming soon